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ABSTRACT

This chapter considers the factors that can aid the process of interaction between an instructional development consultant and a client. The client-consultant relationship is approached through an analysis of the needs of both the developer and the client that brought them together in the beginning. Ways to build on this beginning are discussed, and the importance of listening skills, non-verbal communication, hidden assumptions and expectancies, danger signals, client reinforcement, and monitoring of the relationship are considered. The importance of an explicit contract between the client and the developer is emphasized, and the contents of such a contract are outlined. One figure is provided. (9 references) (Author/EW)

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Chapter 22

The Initial Client Conference: Implications for Continuing Relationship

Robert D. Price

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What happens when a client and a consultant interact? What factors can aid this process of interaction to occur more smoothly. This chapter describes some of these factors and shows how the instructional developer can use them to improve his relationship with his clients.

INTRODUCTION

When an instructional developer interacts with a new client for the first time, the skills that are utilized by the developer in responding to client concerns and the techniques s/he uses to establish a healthy working relationship are both extensive and complex. These instructional developer behaviors determine the nature of the continued working relationship. Such initial behaviors may determine the level of productivity of the relationships as well as the degree and kind of energy necessary to manage a relationship that is personally and professionally satisfying for both the client and the instructional developer.

The skills and techniques that should have competencies, to maximize the outcome of an initial interaction, include the areas of learning systems design, media/materials devlelopment, and evaluation. In addition, "people-oriented" competencies are necessary, including the ability to determine real as opposed to stated client needs (if there is a difference); dyad communication; psychological contract and negotiation; clarification of assumptions and expectations of the working relationship; client reinforcement; organizational behavior; work relationship monitoring; role negotiation; and establishing of working objectives. This list is not all-inclusive; however, these issues will be the concerns of this chapter.

DEVELOPER NEED—CLIENT NEED

The instructional developer and the client usually have multiple reasons for meeting. The developer, in fulfilling the mission of the instructional development service organization, is responding to an institutional commitment to quality education by working with faculty to upgrade the quality of teaching. The developer may also be implementing a set of specifically stated program objectives for the instructional development unit which are aimed at a particular faculty member (who is an opinion leader), a department, or a college. The instructional developer may also be spending time with this particular client because of special research or teaching money that the client may have which may benefit the instructional development program. Other realistic, but not always stated, secondary reasons for interest in a particular client have to do with the potential for a publication or a conference presentation by the instructional developer.

The client may be there because of a genuine concern for instructional quality brought about by self-evaluation or negative student feedback. The client may have been told by a department chairperson or a dean to get assistance in her/his teaching. In such a case, few faculty members can say to the developer that their teaching needs improvement. In many cases the real reason for

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the visit to the instructional developer is clouded in other verbalized reasons, such as "I want to improve my classroom evaluation," or "I would like to develop a video tape on _____," or "Can you help me to develop a set of overhead transparencies on _____," or any one of many reasons which could be given. The developer may choose to grab at the first "problem" identified by the client in an attempt to "solve the problem."

In analyzing instructional developer verbal behavior in initial client contacts, Price (1978) found that developers average 75% of their time discussing solutions to a problem or problems. Davies (1974) also noted the tendency of instructional developers to jump too quickly into problem solving for the client; he indicated that instructional developers have a strong desire to get on with the job rather than to establish a relationship. The developer needs to be aware that in trying to solve the problem too fast, he may not be responding to the client's real assistance needs.

Other reasons that clients may have for asking for some of the developer's time can include such general concerns as helping with departmental curriculum or helping with a special interest project. It is impossible to identify all of the possible reasons a client may seek out the instructional developer; but there are key questions the developer should use in assessing whether the clients stated purpose is consistent with how the developer should be expending the instructional development unit's time. Some of these key questions include: (1) Is the client's stated problem consistent with the instructional development unit's program objectives and mission? (2) Do the client's concerns benefit a large enough number of faculty members or students? (3) Does the client's problem fit with the priorities of his department or college? (4) Does the client have a philosophical and professional orientation which will result in very little productivity in the relationship and produce more disagreement than positive outcomes? (5) Do the client's concerns fit with the developer's personal and professional objectives?

It is important that, during the early stages of establishing the developer/client relationship, the developer not be naive about the purposes and needs of the client, nor about his own needs or the needs of the instructional development unit. It is also important that during this early stage of communication, called "breaking the ice" by Silber (1973), that a warm, open and cordial atmosphere be established between the client and the developer as mutual needs, purposes and values are explored.

LISTENING—NOT TELLING

Depending upon the individual client and the complexity of the client's needs, the whole of the first face-to-face meeting may be concerned with the gathering of information about the client and his perceived needs. The primary role of the instructional developer during this initial communication should be one of listener. Only by being a good listener can the developer establish a database upon which to formulate the best possible response to make to the client. This suggestion is inconsistent with what Price (1976) found instructional developers actually doing during their first initial meeting with their clients. During their first contact with their clients, if problem-statements are presented it is wise for them to spend their time gathering data related to the problem rather than in proposing solutions. If the instructional developer adopts this strategy, it becomes crucial for her/him to be an attentive and analytical listener.

NON-VERBAL COMMUNICATION

The instructional developer must also be a student of non-verbal communication during the initial client/developer interaction. Such knowledge of voice cues, body language and facial expression may provide important information as to possible incongruency between what the client is saying and what the client feels and believes. Such perception on the part of the instructional developer may help her/him in deciding what other areas of the discussion need further clarification. The instructional developer's perceptions will allow for further clarification in certain areas of discussion, or may allow adequate assessment of the client's commitment to the objectives of the working relationship.

ASSUMPTIONS AND EXPECTATIONS

Another outcome of the first meeting with the client should be the examination of assumptions and expectations. When the client comes to the developer, s/he has certain assumptions about what the developer does and how it is done. For example, a client may believe that s/he brings a particular problem to the developer and the developer solves the problem, does all the work and returns a completed product to the client. In the above case, the assumption is that the developer is going to do all the work and the expectation is that the client will have a completed product by a certain date. If this is not the way the developer works, then the developer needs to find out about these false client assumptions early in the relationship. Some instructional developers work only as consultants who send the client away to do the work, to return at a later date for the developer to review the work which has been completed to that point and to make further suggestions. Some developers will do part of the work, such as writing the objectives, but will leave most of the development activities to the client. Some developers consider the client a learner in the relationship and assume that they are teaching someone who will later function independently. It is extremely important that these and other assumptions be clarified while the relationship is being established. It is also important that the role expectations held

by each party and the outcomes of this relationship be established. This can be done by entering into an informal or formal contractual arrangement with the client.

THE CONTRACT

Also included in the domain of the first meeting is the development of a psychological and/or a written contract. The purpose of such a contractual arrangement is to establish, in as much detail as possible, tasks, roles, responsibilities, time-lines, time commitments and accountability. After a clear definition and understanding of the need or problem, and a discussion of the alternatives, a list of tasks needs to be written for the implementation of one or more of these alternatives. In a careful and non-threatening manner, so as not to bombard the insecure client with overwhelming work, assignments should be negotiated with the client. This is an early point of determining the client's commitment to the relationship. It is important that the developer does not try to accomplish too much too fast, but works with the first few tasks and negotiates responsibilities for them, listing specific strategies for each task, with a time-frame for completion. The rest of the tasks can be discussed in a general way to give the client (and the developer) some direction in terms of accomplishments over a broad time frame.

The instructional developer must "read" both verbal phrasing and tonality as well as non-verbal cues to interpret the client's time commitment to the tasks at hand. The developer should not disregard any direct concerns or statements regarding time or commitment. Any such cues, either verbal or non-verbal, should be considered as possible red flags to problems ahead for the relationship.

It is important that during the contracting phase the instructional developer maintain a posture of equality with the client. This can be done by knowing the desired outcome of this particular interaction and the process that is being followed to attain this outcome. Equality can also be achieved by maintaining the role of the professional education specialist with a body of knowledge deserving of an amount of respect which is equal to that deserved by the client's discipline.

The contractual arrangement with the client, whether it be psychological or written (written is preferred), should result in a clear definition of roles and responsibilities, and a time frame for proceeding on specific tasks if enough data is available to move toward such a direction in the first meeting.

CLIENT'S REINFORCEMENT

During the entire first meeting with the client, it is extremely important for the client to be positively reinforced for being a high quality professional, desirous of change and innovation and concerned about the quality of teaching and learning. It is also important that the client be reinforced for all suggestions and ideas, however insignificant they may seem to the developer. It is important for the developer to remember that in most cases the client has taken a risk in asking for assistance. It is difficult for faculty members to take risks where their professional image is concerned, so they need to feel good about their decision. The instructional developer can develop this good feeling through the positive reinforcement of client behavior throughout the initial meeting. Positively reinforcing the client will tend to build a strong, trusting relationship if the reinforcement is genuine. The reinforcement can be genuine if the developer is sensitive to those instances in any discussion where the client can be praised. It is important to note that if such reinforcement comes at a time that is inappropriate or is perceived as insincere, distrust and lack of confidence in the instructional developer will result.

DANGER SIGNALS

During the initial interaction with a new client the instructional developer should keep a watchful eye for the danger signals that may forecast problems ahead. A few of these have been previously mentioned, but there are several others which should serve as red flags to the instructional developer. One of the most common signals is when the client continuously makes negative comments about situations or conversations that seem to be proceeding smoothly. Another, and related, signal is when the client is generally negative about everything discussed in the initial interaction. The rigid or closed client, or the client who is obsessively concerned about an insignificant point or issue, or who is unable to see different points of view will continuously be a problem to the instructional developer, and will result in little or no productivity in the relationship. If the client has a history of being unresponsive to change, then it may not be worth the developer's time and effort to spend much time with her/him. The "ain't it awful" client that only wants to talk about how bad things are, will probably not make efficient use of the developer's time. While working with a client, if there is any hint of being used as a pawn in a political situation, that is a cue to get out as fast as possible. Much thought also must be given to the client who represents a system that has a history of no support, either financial or moral. Diamond (1975) describes the cooperation of the leader(s) of a system as essential before any commitment should be made by an instructional developer.

If the instructional developer is to use his time efficiently, then close attention must be paid to these danger signals and others that were mentioned earlier in this chapter. Not being attentive to such cues in the initial stages of a client relationship can result in the use of much

time and energy with very little return. In the instructional developer's working world this return and productivity are used as measures of success of the individual developer as well as the instructional development program. Also, those clients with little productivity are often the same ones who become critical of the instructional development program when support is being sought for growth or survival. Those clients who truly need the services of the instructional developer and who respond to the developer's skills will become clients who learn, and who reward the developer as much as they are rewarded. This latter group makes the instructional developer's role a rewarding one.

MONITORING THE RELATIONSHIP

If the instructional developer has done a good job in developing the client contract, then the relationship is well on its way towards the establishment of a basis for a good project monitoring process. From the contract, the developer and the client can establish project objectives, which serve as a method for keeping the project on track. The tasks which were mentioned earlier in the contract stage are specific activities which must be completed in order to achieve the project objectives.

One project objective may involve several tasks. Rather than thinking about objectives while establishing a contract, it is usually best to begin at a more specific level, such as with those specific tasks to which the client can better relate. Clients generally like to group tasks, and this grouping process can result in objective statements which summarize and tie together the groups of tasks. The project objectives, the tasks, their timelines and the role definitions become the basis for the monitoring of the project. At any given meeting, discussion should occur concerning the status of each task. This kind of activity is what keeps the project on track and keeps all concerned parties accountable for its successful conclusion. This process is even more important if other faculty members, administrators or production personnel are brought into the project. Another aspect of the monitoring function is the communication of the purposes and current status of the project to the key individuals whom the project will affect. Following the initial meeting with the client, a summary of the meeting should be written and sent to the client and to the client's immediate supervisor and, if instructional policy is not inconsistent with such a strategy, to the dean of her or his college. If the instructional developer works for a Director of Vice-President of Academic Affairs, this person should also receive such communication. In addition to the memo summarizing the meeting with the client, the instructional developer should also summarize the contractual arrangement in a form similar to that of Figure 22-1.

PERSONAL SECURITY

Arbuckle (1970) indicates that the ability of a counselor to establish rapport with a client and to overcome crucial problems in the relationship depends upon the counselor's life experiences and personal security. This also may be true of instructional developers. Those instructional developers who seem to be the most productive with their clients are those who seem to be the most personally secure and those who have had a wide range of life experiences. Those developers who seem to be most secure with their clients are those who also seem not to have to prove themselves to their clients, and those who apparently do not feel a need to "solve the problem quickly" also seem to be personally secure. They seem to "stroke" the client easily, but not inappropriately, and also seem to take "strokes" from the client in a healthy and non-threatening manner. They also seem to get to know their clients as people, and as a result, may be more effective at arriving at the client's "real" problem. These instructional developers also seem particularly adept at identifying the client who is not really committed or who is using them to achieve a secondary gain.

SUMMARY

This paper has described several crucial aspects of the initial phase of the instructional developer/client relationship which have direct impact upon the longitudinal aspects of this relationship. Those areas which have been identified in this chapter include: (1) determining why the client has sought assistance; (2) the rationale for testing assumptions and clarifying expectations; (3) contracting with the client; (4) establishing monitoring procedures for the working relationship; and (5) danger signals for potential client problems. These competencies, along with the personal security held by the instructional developer, are important factors in determining whether the developer/client relationship is a rewarding one for both the client and the developer.

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Figure 22-1. Summary of contract.

PROJECT OBJECTIVE 1. -

TASK	COMPLETION TIME	RESPONSIBILITY
1		
2		
3		
4		
5		

PROJECT OBJECTIVE 2. -

TASK	COMPLETION TIME	RESPONSIBILITY
1		
2		
3		
4		
5		

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